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World Production and Trade

Sja

United States
Department of
Agriculture

Foreign
Agricultural
Service

Washington, D.C. 20250

Weekly
Roundup

WR 42-87

Oct. 21, 1987

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade.

U.S. EXPORT SALES

U.S. EXPORTS of Wheat and Soybeans Post Volume Gains for Second Year. The following table compares accumulated exports and outstanding sales for similar periods in the 1986/87 and the 1987/88 marketing years as reported under FAS's Export Sales Reporting Program. Data for 1986/87 are as of Oct. 2, 1986, while data for 1987/88 are as of Oct. 1, 1987. Accumulated exports are commodities which have been sold and exported. Outstanding sales are commodities which have been sold but not yet exported. Data are measured in thousand units (metric tons/bales).

Commodity	Year beginning	Accumulated exports		Outstanding sales	
		86/87	87/88	86/87	87/88
Wheat	June 1	11,029	13,684	3,692	5,139
Corn	Sept. 1	2,255	3,264	6,850	6,456
Grain Sorghum	Sept. 1	316	379	950	639
Soybeans	Sept. 1	827	1,531	4,474	5,425
Rice	Aug. 1	696	375	458	545
Cotton	Aug. 1	869	644	3,887	3,749

GRAIN AND FEED

ARGENTINA Doubles Wheat Exports to IRAN. The Argentine government recently announced a 1-year agreement with Iran to deliver 1 million tons of wheat in 1987/88--double last year's shipments. The agreement level accounts for nearly 20 percent of the current USDA export estimate for Argentina of 5 million tons for 1987/88 (July/June). The United States has not exported wheat to Iran since 1981/82 when it supplied about 53 percent (728,000 tons) of Iran's total imports (1.4 million tons July/June). Since 1981/82, Iran has purchased an average of 2.6 million tons of wheat from U.S. competitors. The current USDA import estimate for Iran is 2.5 million tons for 1987/88.

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OILSEEDS AND PRODUCTS

U.S. Peanut Exports Begin Year at Record Pace. U.S. peanut exports for the first month of the 1987/88 marketing year (Aug/July) were over 32,000 tons, a record for the month and the largest monthly level since November 1986. Edible peanuts accounted for most of the total. Virtually all of the increase went to Europe, while exports to Japan and Canada decreased for the month. Significantly lower prices were responsible for the increased trade to Europe.

EC Reduces Subsidy for Crushers of EC Soybeans. The European Community's (EC) subsidy paid to crushers of EC-produced soybeans was reduced by about 10 percent or 4.271 European Community Units per 100 kilograms. The reduction is the maximum possible and was necessary because the production forecast exceeded by 26 percent the guaranteed threshold of 1.1 million tons. The subsidy reduction means lower prices for producers this crop year. However, some Italian producers were able to escape the reduction since they contracted sales before the end of July. Italian production accounts for about 90 percent of the total EC soybean output.

DAIRY, LIVESTOCK AND POULTRY

DENMARK'S Milk Production Down Sharply. Milk production in Denmark in 1987 is expected to be 4.85 million tons, 5 percent below 1986, according to the U.S. agricultural counselor in Copenhagen. For the same period, milk cow numbers declined 7 percent to 0.8 million head. Forecasts for 1988 indicate that further sharp declines in cow numbers and milk production are likely. These declines are due to the EC quota system.

Cheese production in 1987 is expected to total 264,000 tons, up 4 percent while output of butter totals 97,000 tons, down 14 percent. Despite the decline in milk production, more milk was used for cheese production because changes in the intervention buying rules decreased opportunities for profitable butter production.

JAPAN'S Milk Production Declines. In Japan, milk output in 1987 is expected to total 7.38 million tons, 1 percent below 1986, according to the U.S. agricultural counselor in Tokyo. Milk cow numbers at 1.05 million head are down over 4 percent for the same period. The declines are largely the result of a 1-percent cut in delivery quotas set by the producers association and of a government program which uses subsidy payments to encourage culling to cut production. Profits made on government resale of imported beef were used to fund the subsidies.

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COTTON

Main SOVIET Cotton Area Hit By Bad Weather. Freezing temperatures and hard rains hit part of the Uzbek Republic during the week of October 12. This area produces two-thirds of the cotton in the USSR. In the delta region in the north near the Aral Sea, where nearly 10 percent of the Uzbek crop is produced, a hard freeze effectively ended the growing season. Heavy rains during October 7-9 also hurt crop quantity and quality in the southern and eastern parts of the republic and caused further delays in the harvest. The season has been late there from the outset because of a cool, wet spring. Cool, wet conditions occurred again later during the growing season, as well. Nearly half of the Uzbek cotton comes from the areas affected by the heavy rains.

FRUITS

Storm Damages SPANISH Crops. The U.S. agricultural counselor in Madrid reports that torrential rains and hailstorms from October 2-6 damaged agricultural areas along Spain's Mediterranean coastline from Catalonia to Almeria. Considerable localized damage occurred to the following crops: apples, wine and table grapes, citrus, strawberries, rice, vegetables and cotton.

NUTS

WORLD Pistachio Production Forecast To Decline in 1987. Commercial pistachio output by selected world producers is currently forecast at 47,300 tons (inshell basis), down 18 percent from the 1986 volume and 23 percent below the record harvest of 61,600 tons in 1985. Much of the shortfall is explained by the cyclical nature of this tree crop. The record on-year harvests currently forecast for Greece, Italy and Syria will not offset the sharp downturns expected in the United States and Turkey. The United States is experiencing an off year, with output forecast down 60 percent to 13,600 tons, despite favorable growing conditions and an 11-percent increase in bearing area. Turkey's 1987 on-year crop should have balanced the short U.S. harvest by nearing the record 1985 outturn of 33,000 tons; however, drought is expected to reduce output to only 12,000 tons.

Commercial production of pistachios in selected countries is as follows in 1,000 metric tons (inshell basis):

	1985	1986	1987 1/
Greece	2.3	2.3	3.2
Italy	2.0	0.3	4.5
Syria	12.0	13.0	14.0
Turkey	33.0	8.0	12.0
United States	12.3	34.0	13.6
Total	61.6	57.6	47.3

1/ Preliminary.

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WORLD Walnut Production To Reach Record Level in 1987. World walnut production for 1987 is currently forecast at 503,400 tons (inshell basis), up 18 percent from a year ago and potentially the largest world crop to date. Record yields in the United States are expected to boost walnut production to a new high of 235,900 tons, 44 percent above last year's off-year crop. Quality appears excellent with minimal damage from sunburn, insects or blight.

The Chinese walnut industry is expanding. From 76,000 tons in 1977, output has surged 86 percent, culminating in a 1987 production forecast of 138,000 tons. In all the major growing areas of China, increasing numbers of walnut trees are being planted and/or improved through grafting. Yields continue to rise as farmers use better management techniques and more government funds are channeled into purchasing quality varietal stock and insecticides.

During the 1987 season, French growers are expected to harvest 24,500 tons of walnuts for commercial use. Production in the southwest region of Bordeaux--which accounts for more than 60 percent of total output--is estimated at 16,500 tons, up 18 percent from a year ago. Quality appears good with a high percentage of large-sized nuts. Production of walnuts in the southeast region that qualify for the "Grenoble" designation is projected to decline from 7,500 tons in 1986 to 6,000 tons this year; the volume of minor varieties is expected to remain the same at 2,000 tons. Weather in southeast France has not been ideal. Excessive rainfall spurred the spread of diseases, hitting trees that were still recovering from storm damage in 1982, severe frost damage in 1985 and prolonged drought last year. The cumulative result has been the reduction of production potential in the Grenoble region by at least 40 percent. However, rising production in young orchards outside the Grenoble area has allowed total output to increase relative to previous years.

After several years of poor crops, Italian walnut production for 1987 is forecast at 20,000 tons, potentially the largest harvest of the past decade. Favorable weather boosted yields but, given the current state of the Italian walnut industry (declining area, old trees of low productivity, haphazard replanting, lack of government support programs and/or incentives), the gain this season is not likely to be repeated. The long-term outlook is for further reductions in line with the trend apparent for the past several years.

Smaller crops than last year are expected in both India and Turkey. Despite small increases in the number of bearing trees, Turkey's walnut production has been trending downward for the past three years due to excessively dry weather. India's 1987 crop is currently pegged at only 20,000 tons--after six years of sustained growth. Early season rains followed by hail storms and dry weather during the flowering and fruit formation stages were responsible for the decline. Nut quality and coloring reportedly are below normal with kernal sizes smaller than last year.

Commercial production of walnuts in selected countries is as follows in 1,000 tons (inshell basis):

	1985	1986	1987 1/
China	121.9	136.0	138.0
France	23.3	23.5	24.5
India	22.0	23.0	20.0
Italy	14.0	12.0	20.0
Turkey	70.0	68.0	65.0
United States	198.7	163.3	235.9
Total	449.9	425.8	503.4

1/ Preliminary.

WEEKLY EXCHANGE RATE DEVELOPMENTS

The dollar continued to decline during the week ending October 16, since the slim narrowing release of the U.S. trade gap--from a record \$16.47 billion in July to \$15.68 billion in August--was seen as too small to offset the prolonged descent of the U.S. dollar vis-a-vis other major currencies.

Currencies	Current rate 10/15/87	----Percent change from----		
		10/8/87	month ago 9/17/87	year ago 10/86
Argentine Austral	2.6303	.00	10.54	146.28
Australian Dollar	1.3731	-.54	.82	-12.25
Brazilian Cruzado	53.0200	1.39	6.04	282.07
Canadian Dollar	1.2996	-.49	-1.19	-6.33
South African Rand	2.0813	.94	1.83	-7.38
Thai Baht	25.8300	.00	.58	-.93
ECU	.8672	-1.18	-.93	-10.12
British Pound	.6017	-.66	-.90	-14.12
French Franc	6.0135	-.43	-.60	-8.37
West Germany Mark	1.8023	-.50	-.65	-10.15
Japanese Yen	141.8400	-1.43	-1.01	-9.35
South Korean Won	805.8000	.00	-.06	-7.69
New Taiwan Dollar	29.9300	.00	-.39	-18.35

Exchange rates are spot as of 3 p.m. eastern time, October 15.

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EXPORT ENHANCEMENT INITIATIVES

The status of USDA's Export Enhancement Program as of Oct. 15, 1987, was as follows in metric tons:

ANNOUNCED INITIATIVES	DATE ANNOUNCED	QUANTITY/RESULTS
77. Morocco vegetable oil	Oct. 13, '87	60,000
76. Tunisia vegetable oil	Sept. 24, '87	60,000
75. Singapore frozen poultry	Sept. 24, '87	2,000
74. Near East table eggs (Bahrain, Kuwait, Oman, Qatar, United Arab Emirates, Yemen)	Aug. 27, '87	50 million eggs Sold 24.8 million eggs
73. Saudi Arabia dairy cattle	Aug. 27, '87	2,000 head
72. Iraq barley	Aug. 10, '87	150,000 Sold 100,000
71. Brazil wheat	July 30, '87	300,000 Sold 66,000
70. Colombia wheat	July 30, '87	300,000
69. Israel wheat	May 29, '87	200,000
68. Bangladesh wheat	May 22, '87 July 8, '87 Aug. 12, '87 Sept. 10, '87	100,000 50,000 150,000 300,000 COMPLETE COMPLETE Sold 144,500
67. Soviet Union wheat	Apr. 30, '87 Oct. 15, '87	4,000,000 65,000 COMPLETE COMPLETE
66. Turkey rice	Apr. 3, '87	70,000 Sold 12,000
65. Colombia barley malt	Apr. 3, '87	15,000
64. Iraq table eggs	Feb. 20, '87	189 million eggs Sold 178 million
63. Canary Islands poultry	Feb. 9, '87	5,000 Sold 2,000
62. Nigeria wheat	Jan. 28, '87	500,000
61. China wheat	Jan. 26, '87 Aug. 18, '87	1,000,000 1,000,000 COMPLETE COMPLETE
60. Iraq wheat	Jan. 16, '87	800,000 Sold 715,000
59. Switzerland barley or sorghum	Jan. 16, '87	250,000 Sold 9,000
58. Poland wheat	Jan. 7, '87 July 2, '87	500,000 500,000 COMPLETE Sold 451,000
57. Poland barley or sorghum	Dec. 31, '86	200,000 Sold 167,000
56. Romania wheat	Dec. 23, '86	250,000
55. Iraq poultry	Dec. 22, '86 Oct. 2, '87	60,000 10,000 COMPLETE
54. Dominican Republic table eggs	Dec. 9, '86	25 million eggs Sold 11.1 million eggs
53. Zanzibar wheat flour	Dec. 9, '86	20,000 Sold 6,000
52. Tunisia barley	Dec. 1, '86	150,000
51. Gulf countries (Bahrain, Kuwait, Oman, Qatar, United Arab Emirates) dairy cattle	Oct. 30, '86 Aug. 27, '87	1,500 head COMPLETE 1,500 head

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

50.	West Africa (Benin, Burkina Faso, Cameroon, Cote d'Ivoire, Ghana, Gabon, Liberia, Niger, Togo) wheat	Oct. 30, '86	345,000	Sold 116,200
49.	Dominican Republic poultry	June 15, '87 Oct. 29, '86	185,000 1,500	COMPLETE
48.	Philippines barley malt	Oct. 20, '86	60,000	Sold 25,000
47.	Cameroon wheat flour	Oct. 14, '86	20,000	
46.	Romania barley	Sept. 24, '86	200,000	Sold 125,000
45.	Venezuela barley malt	Sept. 4, '86	100,000	
44.	Cyprus barley	Aug. 26, '86	150,000	Sold 118,000
43.	Canary Islands wheat	Aug. 8, '86	100,000	
42.	Egypt semolina	Aug. 6, '86 Sept. 29, 1987	30,000 Balance	Sold 23,000 withdrawn
41.	Soviet Union wheat	Aug. 1, '86	4,000,000	EXPIRED
40.	Canary Is. dairy cattle	July 28, '86	3,000 head	Sold 2,985
39.	Hong Kong table eggs	July 28, '86	44 million eggs	COMPLETE
38.	Senegal wheat	July 17, '86 Sept. 11, '87	100,000 110,000	COMPLETE
37.	India vegetable oil	July 8, '86	25,000	COMPLETE
36.	Jordan barley	June 17, '86	60,000	COMPLETE
35.	Israel barley	June 17, '86 Sept. 14, '87	200,000 200,000	COMPLETE Sold 13,324
34.	Tunisia dairy cattle	May 29, '86	4,000 head	COMPLETE
33.	Algeria dairy cattle	May 29, '86	5,000 head	COMPLETE
32.	Sri Lanka wheat	May 16, '86 March 5, '87	125,000 95,000	COMPLETE Sold 85,000
31.	Saudi Arabia barley	Aug. 20, '87 May 7, '86 Aug. 6, '86 Sept. 16, '86 Oct. 8, '86 Jan. 5, '87 May 15, '87 Aug. 4, '87	240,000 500,000 250,000 300,000 200,000 1,250,000 500,000 500,000	COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE (201,000) COMPLETE COMPLETE COMPLETE
30.	Algeria barley	Apr. 17, '86	500,000	Sold 108,000
29.	Morocco dairy cattle	Apr. 16, '86	4,000 head	COMPLETE
28.	Turkey dairy cattle	Apr. 16, '86 June 18, '86	5,000 head 5,000 head	COMPLETE COMPLETE
27.	Egypt dairy cattle	Apr. 16, '86 Sept. 12, '86	6,000 head 10,000 head	COMPLETE Sold 3,501
26.	Yemen poultry feed	Apr. 14, '86	150,000	Sold 111,468
25.	Yugoslavia wheat	Apr. 10, '86 June 24, '86 Oct. 7, '86	200,000 200,000 500,000	COMPLETE COMPLETE Sold 417,050

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

24. Indonesia dairy cattle	Apr. 9, '86	7,500 head	COMPLETE
	June 18, '87	8,000 head	COMPLETE
	Oct. 5, '87	8,000 head	
23. Syria wheat	Apr. 8, '86	700,000	CANCELED
22. Benin wheat (remaining 15,000 tons transferred to West Africa)	Apr. 7, '86	45,000	COMPLETE
21. Algeria table eggs	Apr. 4, '86	500 million	Withdrawn eggs
	Sept. 29, '87		
20. Iraq dairy cattle	Apr. 4, '86	6,500 head	Sold 6,028
19. Jordan wheat	Mar. 19, '86	75,000	COMPLETE
	June 20, '86	75,000	COMPLETE
	Dec. 31, '86	225,000	COMPLETE
18. Tunisia wheat	Mar. 18, '86	300,000	COMPLETE
	Aug. 22, '86	800,000	Sold 300,000
17. Algeria wheat flour	Feb. 25, '86	100,000	
	Sept. 29, '87		Withdrawn
16. Algeria semolina	Feb. 11, '86	250,000	Sold 30,000
15. Philippines wheat	Jan. 7, '86	150,000	COMPLETE (152,400)
	Aug. 10, '87	500,000	Sold 300,000
14. Zaire wheat	Dec. 27, '85	35,000	COMPLETE
	May 15, '86	45,000	COMPLETE
	Oct. 10, '86	40,000	COMPLETE
	July 16, '87	80,000	Sold 45,000
13. Nigeria barley malt	Dec. 10, '85	100,000	Sold 80,464
12. Iraq wheat flour	Dec. 9, '85	150,000	COMPLETE
	Jan. 7, '87	175,000	Sold 75,000
11. Egypt poultry	Nov. 26, '85	8,000	COMPLETE
	Mar. 21, '86	15,000	COMPLETE
	June 18, '86	5,000	COMPLETE
	July 8, '86	15,000	COMPLETE
	Dec. 19, '86	25,000	COMPLETE
	Feb. 27, '87	6,000	COMPLETE
10. Zaire wheat flour	Nov. 18, '85	64,000	COMPLETE
	May 15, '86	30,000	COMPLETE
9. Philippines wheat flour	Nov. 15, '85	100,000	Sold 50,000
	Sept. 29, '87		Balance withdrawn
8. Jordan rice	Nov. 8, '85	40,000	Sold 38,700
	Jan. 13, '87	60,000	
7. Turkey wheat	Oct. 16, '85	500,000	COMPLETE (506,600)
	May 8, '86	500,000	Sold 248,000
6. Morocco wheat	Sept. 30, '85	1,500,000	COMPLETE
	Dec. 9, '86	790,000	COMPLETE
5. Yemen wheat	July 1, '87	500,000	Sold 310,000
	Sept. 6, '85	100,000	COMPLETE
	Jan. 26, '87	100,000	COMPLETE

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

4. Yemen wheat flour	Aug. 20, '85	50,000	COMPLETE
	Apr. 14, '86	100,000	COMPLETE
	May 18, '87	100,000	Sold 50,000
3. Egypt wheat	July 26, '85	500,000	COMPLETE
	Oct. 30, '85	500,000	COMPLETE
	June 24, '86	500,000	COMPLETE
	July 29, '86	52,000	COMPLETE
	Oct. 8, '86	1,000,000	COMPLETE
2. Egypt wheat flour	July 8, '87	500,000	Sold 350,000
	July 2, '85	600,000	COMPLETE
	Aug. 6, '86	600,000	Sold 356,000
1. Algeria wheat (ex durum)	June 4, '85	1,000,000	COMPLETE
wheat (ex durum)	Apr. 10, '86	1,000,000	Sold 616,000
durum	Nov. 10, '86	300,000	COMPLETE
durum	Mar. 16, '87	300,000	COMPLETE
durum	July 24, '87	300,000	Sold 244,000

EXPORT ENHANCEMENT PROGRAM SUMMARY

Announced as of Oct. 15, 1987

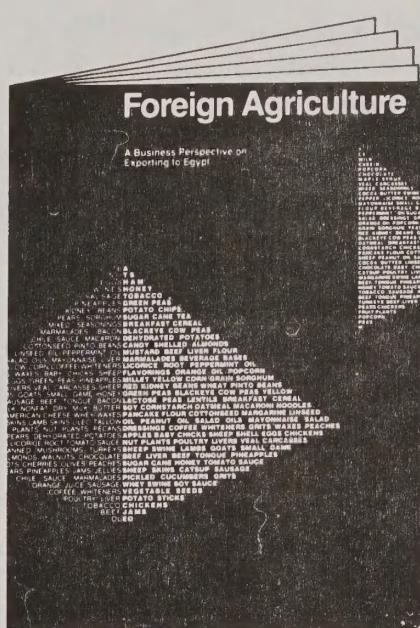
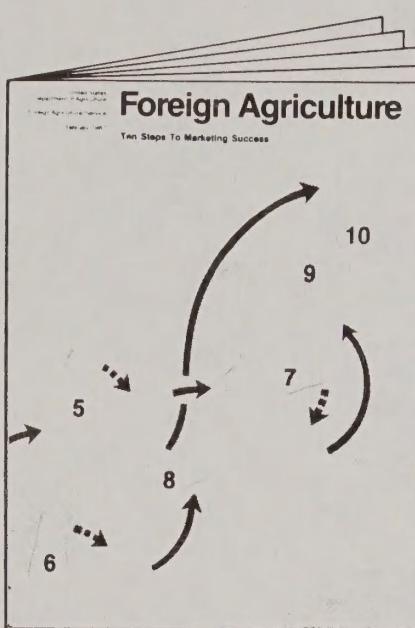
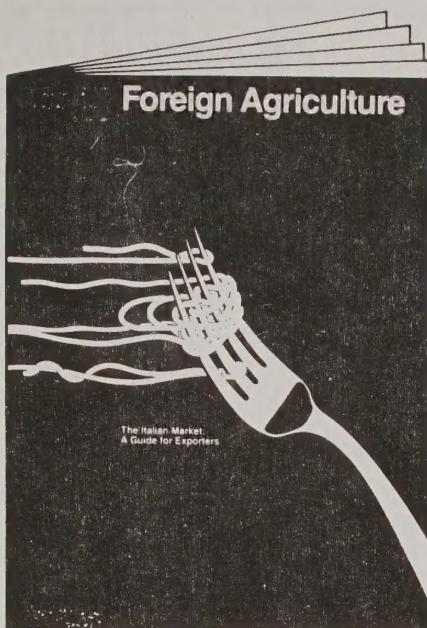
Announced to Date	33,582,690 tons grains and products (grain equivalent) 308 million table eggs 152,500 tons frozen poultry 77,000 head dairy cattle 145,000 tons vegetable oil
Sold to Date	19,885,759 tons wheat 2,101,466 tons flour (grain equivalent) 4,259,324 tons barley 72,610 tons semolina (grain equivalent) 140,615 tons barley malt (grain equivalent) 106,000 tons sorghum 50,700 tons rice 111,468 tons poultry feed 25,000 tons vegetable oil 137,499 tons frozen poultry 58,514 head dairy cattle 257,773,548 table eggs
Total Sales Value:	\$2,520.9 million
Estimated Bonus Book Value:	\$1,747.8 million
Market Value of Awards:	\$1,223.4 million

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Selected International Prices

Item	: October 20, 1987	: Change from	: A year
	: a week ago		: ago
ROTTERDAM PRICES 1/			
Wheat:			
Canadian No. 1 CWRS-13.5%.	146.50	3.99	-2.50
U.S. No. 2 DNS/NS: 14%....	138.50	3.77	-1.50
U.S. No. 2 S.R.W.	134.00	3.65	-2.00
No. 3 H.A.D.....	159.50	4.34	-0.50
Canadian No. 1 A: Durum...	166.00	4.52	-0.50
Feed grains:			
U.S. No. 3 Yellow Corn....	94.50	2.40	+0.50
Soybeans and Meal:			
U.S. No. 2 Yellow.....	216.05	5.88	+0.65
Brazil 47/48% Soya Pellets	232.00	--	+5.00
U.S. 44% Soybean Meal.....	209.00	--	+3.00
U.S. FARM PRICES 3/			
Wheat	95.89	2.61	+1.47
Barley.....	61.55	1.34	+2.30
Corn.....	61.42	1.56	+1.18
Sorghum.....	56.00	2.54 2/	+1.32
Broilers.....	928.50	--	-31.08
			1,503.98
EC IMPORT LEVIES			
Wheat 5/.....	210.05	5.72	+1.48
Barley.....	206.08	4.49	-1.06
Corn.....	189.39	4.81	+1.27
Sorghum.....	194.64	4.94	+0.30
Broilers 4/ 6/ 8/.....	512.00	--	+4.00
			369.00
EC INTERVENTION PRICES 7/ 9/			
Common wheat(feed quality)	183.04	4.98	+0.29
Bread wheat (min. quality)	192.67	5.24	+0.30
Maize.....	192.67	4.89	+0.30
Barley and all other feed			
grains, excluding maize.	183.04	--	+0.29
Broilers 4/ 6/.....	1,557.00	--	-7.00
			1,562.00
EC EXPORT RESTITUTIONS (subsidies)			
Wheat	138.37	3.77	+6.76
Barley.....	142.99	3.11	+3.97
Broilers 4/ 6/ 8/.....	425.00	--	+4.00
			324.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Five-day moving average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ Changes may be due partly to exchange rate fluctuations and/or ECU payments. N.A.=None authorized. N.Q.=Not quoted. Note: Basis November delivery.



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